

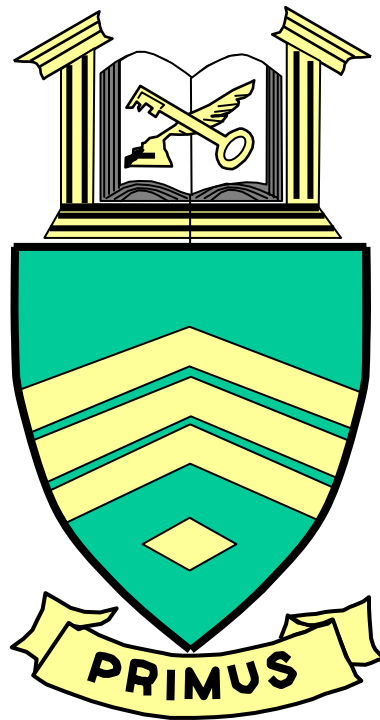
U.S. ARMY SERGEANTS MAJOR ACADEMY (FSC-TATS)

C653 (052002)

JUN 01

BRIEFING

PRERESIDENT TRAINING SUPPORT PACKAGE



Overview

Someone once said, "As a man thinks, so he is; as a man speaks, so others think he is." Since your performance ratings come from others, what they think of your abilities is important. Your ability to speak is one of the things on which your raters will judge you. More importantly, the ability to say the correct thing, at the appropriate moment and in the right way, is an important part of leadership. Your skill in one aspect of speaking, presenting briefings, is important not only to you, but to the person you are briefing. FM 101-5 points out that "The staff assists the commander in making timely decisions by providing him with critical information to support his battlefield visualization." Your ability to communicate effectively in a briefing can have a critical impact on the mission.

This lesson will take you approximately three hours to complete.

Inventory of Lesson Materials

Prior to starting this lesson, ensure you received all materials (pages, tapes, disks, etc.) required for this Training Support Package. Go to the **"This [TSP or Appendix] Contains"** section on page two of the TSP and the first page of each Appendix, and verify you have all the pages. If you are missing any material, contact the First Sergeant Course Class Coordinator at the training institution where you will attend phase II FSC-TATS.

Point of Contact

If you have any questions regarding this lesson, contact the First Sergeant Course Class Coordinator at the training institution where you will attend phase II FSC-TATS.

PRERESIDENT TRAINING SUPPORT PACKAGE

**TSP Number/
Title** C653
Briefing

Effective Date JUN 01

**Supersedes
TSPs** C653, Briefing
Oct 00

TSP User This TSP contains a training requirement that you must complete prior to attending phase II, FSC-TATS. It will take you about three hours to complete this requirement.

Proponent The proponent for this document is the U.S. Army Sergeants Major Academy. POC: FSC Course Chief, DSN: 978-8329/8848; commercial: (915) 568-8329/8848.

**Comments/
Recommendations** Send comments and recommendations on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to:

ATTN ATSS DCF FSC TATS
COMDT USASMA
BLDG 11291 BIGGS FLD
FT BLISS TX 79918-8002

**Foreign
Disclosure
Restrictions** The lesson developer in coordination with the USASMA foreign disclosure authority has reviewed this lesson. This lesson is releasable to foreign military students from all requesting foreign countries without restrictions.

**This TSP
Contains**

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SECTION I ADMINISTRATIVE DATA**Tasks
Trained**

This lesson trains the tasks listed in the following tables:

Task number:	158-300-0020
Task title:	Conduct a Military Briefing,
Conditions:	Given a task to provide a briefing to a superior officer, an assigned briefing time, the assigned topic, access to appropriate information, materials for delivery aids (charts, viewgraphs, handouts, or slide projectors) appropriate for the task and purpose, and the requirement to wear appropriate military dress.
Standard	The briefing must meet the following standards: a. Comply with the Army standard on all briefing notes or text i.e. "Army writing transmits a clear message in a single rapid reading and is generally free of errors in grammar, mechanics and usage." b. Include an introduction which contains an attention getting statement, a clear and concise controlling idea, and an announcement of two to five major parts supporting the controlling idea.

Standard Continued:	<p>c. Integrate facts and evidence into the briefing demonstrating sound reasoning and logic which support the major parts of the briefing.</p> <p>d. Communicate the commander's intent.</p> <p>e. Demonstrate an organization and style which increase the audience's understanding of the presentation and without reading a text.</p> <p>f. Include clear transitions and effectively sequenced major parts.</p> <p>g. Comply with appropriate American English rules concerning word usage and correct grammar.</p> <p>h. Communicate clearly using mostly active voice verbs.</p> <p>i. Communicate concisely by eliminating jargon and wordiness.</p> <p>j. Comply with military standards of conventionality in delivery, bearing, and dress.</p> <p>k. Provide brief, correct answers to all questions.</p> <p>l. Complete the briefing in the time allowed, if specified.</p>
Task Proponent:	Center for Army Leadership, U.S. Army Command and General Staff College, ATTN: ATZL-SWC-LE, Fort Leavenworth, Kansas 66027-2314.

Task number:	155-397-0010
Task title:	Integrate Critical Thinking Skills Derived from Military History Methodologies into the Advanced Training and Education of Subordinate Officers, Warrant Officers, and Non-Commissioned Officers.
Conditions:	Given information on how to Integrate Critical Thinking Skills Derived from Military History Methodologies into the Advanced Training and Education of Subordinate Officers, Warrant Officers, and Non-Commissioned Officers.
Standard:	Correctly define combined arms warfare and its role in military professional development. Correctly define, describe, and execute advanced battle analysis methodology. Correctly define and describe the staff ride planning methodology.
Task Proponent:	U. S. Army Training and Doctrine Command, Ft Monroe, VA

**Task(s)
Reinforced** None

**Prerequisite
Lesson(s)** C651, Communication

**Clearance
and Access** There are no clearance or access requirements for this lesson.

**Copyright
Statement** No copyrighted material reproduced for use in this lesson.

Reference The following table lists the reference for this lesson:

Number	Title	Date	Para	Additional Information
FM 101-5	<u>Staff Organization and Operations</u>	31 May 1997	App. E.	Required sections included in SH 1.
Student handout 2	Effective Speaking	Jun 98		
Student handout 3	Standards for Information Briefing	Jun 98		
Student handout 4	Battle Analysis Study Guide	Jun 98		

**Equipment
Required** None

**Materials
Required** This preresident training package contains all material necessary to complete this lesson.

**Safety
Requirements** None

Risk Low

**Assessment
Level****Environmental
Considerations**

None

**Lesson
Approval**

The following individuals have reviewed and approved this lesson for publication and incorporation into the First Sergeant Course--Total Army Training System.

Name/Signature	Rank	Title	Date
Kevin L. Graham	MSG	Lesson Developer	
Chris L. Adams	SGM	Chief Instructor, FSC	
John W. Mayo	SGM	Course Chief, FSC-TATS	

SECTION II INTRODUCTION**Terminal
Learning
Objective**

At the completion of this lesson, you will--

Action:	Analyze the elements of a military briefing,
Conditions:	as a first sergeant in a classroom environment, given SH-1 thru SH-4,
Standard:	Analyzed the elements of a military briefing IAW SH-1 thru SH-4.

Evaluation

Your instructor will evaluate your oral presentation skills throughout phase II of FSC-TATS. Your instructor will also evaluate your delivery of an information briefing. Your briefing is a performance evaluation and you must achieve a “go” to graduate. If your briefing is “unsatisfactory”, you will retest before graduation from FSC-TATS.

**Instructional
Lead-in**

During this lesson you will study the formats and techniques used in military briefings as prescribed in FM 101-5, Appendix E (Student Handout 1). You will also study ways to improve your oral communication skills. Student Handout 2 contains tips on effective speaking. During phase II of this course you will present an information briefing. Student Handout 3 details specifically how your instructor will evaluate your information briefing. The subject of your information briefing will be a battle analysis. Student Handout 4 is a study guide for battle analysis. The lesson exercise in Appendix B will help guide your study of military briefings.

SECTION III, PRESENTATION**ELO 1**

Action:	Compare the purposes and formats of the four types of military briefings,
Conditions:	as a first sergeant in a classroom environment, given SH-1,
Standard:	Compared the purposes and formats of the four types of military briefings IAW SH-1.

**Learning
Step/Activity
(LS/A) 1,
ELO 1**

To complete the learning activity, you must--

- Study Student Handout 1 (Appendix C).
- Complete items 1 thru 13 in lesson exercise (LE) 1 (Appendix B).
- Compare your responses with the suggested solution found in the solution to LE-1 (SLE-1) (Appendix B).
- Review the reference on any item with which your response does not agree.

ELO 2

Action:	Articulate how to prepare and deliver effective oral presentations,
Conditions:	as a first sergeant in a classroom environment, given SH-1, thru SH-3,
Standard:	Articulated how to prepare and deliver effective oral presentations IAW SH-1 thru SH-3.

LS/A 1, ELO 2 To complete the learning activity, you must--

- Study Student Handouts 1, 2 and 3 (Appendix C).
 - Complete items 14 thru 34 in lesson exercise 1 (Appendix B).
 - Compare your responses with the suggested solution found in the solution to LE-1 (Appendix B).
 - Review the reference on any item with which your response does not agree.
-

ELO 3

Action:	Identify the elements of a battle analysis,
Conditions:	as a first sergeant in a classroom environment, given SH-4,
Standard:	Identified the elements of a battle analysis IAW SH-4.

LS/A 1, ELO 3 To complete the learning activity, you must--

- Study Student Handout 4 (Appendix C).
 - Complete items 35 thru 42 in lesson exercise 1 (Appendix B).
 - Compare your responses with the suggested solution found in the solution to LE-1 (Appendix B).
 - Review the reference on any item with which your response does not agree.
-
-

SECTION IV SUMMARY

**Review/
Summarize
Lesson**

During this lesson you studied the formats and purposes of the different types of briefings and discussed preparation and speaking skills that will make your presentations effective. As LTG George W. Patton, Jr. wrote, "To be a successful soldier, you must know history." We looked at battle analysis as a

systematic approach to study military history. You can utilize the skills covered in this lesson throughout your career.

Check on Learning

The lesson exercise you completed in Appendix B will serve as the check on learning for this lesson.

Transition to Next Lesson

None

SECTION V STUDENT EVALUATION

Testing Requirements

Your instructor will evaluate your oral presentation skills throughout phase II of FSC-TATS. Your instructor will also evaluate your delivery of a battle analysis information briefing. Your briefing is a performance evaluation and you must achieve a “go” to graduate. If your briefing is “unsatisfactory”, you will retest before graduation from FSC-TATS.

SECTION VI QUESTIONNAIRE

Directions Complete the following actions:

- Enter your name, your rank, and the date you complete this questionnaire.

Name:	Rank:	Date:
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	<ul style="list-style-type: none"> • Answer items 1 through 6 below. • Fold the questionnaire, so the address for USASMA is visible. • Print your return address, add postage, and mail. <p>Note: Your response to this questionnaire will assist the Academy in refining and improving this course. When completing the questionnaire, answer each question frankly. Your assistance helps build and maintain the best curriculum possible.</p>
Item 1	Do you feel you have met the learning objectives of this lesson?
Item 2	Was the material covered in this lesson new to you?
Item 3	Which parts of this lesson were most helpful to you in learning the objectives?
Item 4	How could we improve the format of this lesson?
Item 5	How could we improve the content of this lesson?
Item 6	Do you have additional questions or comments? If you do, please list them here. You may add additional pages if necessary.

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Appendix B**Index of Lesson Exercises and Solutions**

**This Appendix
Contains**

This Appendix contains the items listed in this table--

Title/Synopsis	Pages
Lesson Exercise 1, Briefing	LE-1-1 thru LE-1-10
Solution/Discussion to LE-1	SLE-1-1 thru SLE-1-7

Lesson Exercise 1

Briefing

Overview: Before completing this lesson exercise, study student handouts 1 thru 4. This lesson exercise begins with a review of Appendix E of FM 101-5 (Student Handout 1). We will then look at Student Handout (SH) 2 on effective speaking which elaborates on some of the items in the briefing outline in Appendix E of FM 101-5. We will look at SH 3 which explains, in detail, how your instructor will grade you on your information briefing during phase II of FSC-TATS. You will want to study SH 3 carefully. Student Handout 4 explains battle analysis. You will use a battle analysis for the subject of your information briefing. As you read this lesson exercise, complete the items below.

ELO 1: Compare the purposes and formats of the four types of military briefings. (Reference: SH-1)

The military briefing is an operational tool essential to every officer and noncommissioned officer. We use briefings to keep the commander and staff informed of current or anticipated situations and problems facing the command.

Item 1: When presenting a military briefing, what determines the technique employed?

Item 2: What are the four types of military briefings?

As its name implies, the purpose of an information briefing is to inform the listener and gain his or her understanding.

Item 3: An information briefing deals primarily with what?

An information briefing does not include recommendations or require decisions. An information briefing often deals with:

- High priority information requiring immediate attention.
- Complex information involving complicated plans, systems, statistics, or charts.
- Controversial information requiring elaboration and explanation.

Item 4: What is the intent of a decision briefing?

The decision briefing includes many elements of the information briefing, but it is essentially a staff study presented in oral form. If you want more information on staff studies, refer to FM 101-5, appendix D. In a decision briefing, if the briefer does not receive a decision at the conclusion of his briefing, he should ask for it. The briefer should be certain he understands the decision thoroughly. He should ask for clarification if necessary.

Item 5: What is the purpose of the mission briefing?

We would also use a mission briefing to clarify roles, detail requirements and instructions, and reinforce orders. Giving a mission briefing requires concentration and the utmost clarity because of the specific nature of the information you are presenting. You must use this degree of care to make sure you do not confuse the audience or present information that conflicts with other orders. The final type of military briefing we'll talk about is the staff briefing.

Item 6: What is the intent of a staff briefing?

Now that we've discussed the different types of briefings and their purposes, let's look at format. All oral presentations should have three major areas: introduction--body--closing. However, the format--what we have to include in each of these areas--is very specific for some types of briefings. When we are briefing, we must make sure that we follow those specific formats.

Item 7: What are the four parts of the information briefing introduction?**Item 8:** What must a briefer do during the greeting of an information briefing?**Item 9:** Where in the introduction should you give the big picture first?

When you state the purpose and scope, be brief. Put your bottom line up front. You also want to get your audience's attention. We will further discuss the attention step in SH 2.

Item 10: What should you include in the outline or procedure part of the introduction?

If the outline or procedure is complex, introduce it, but explain your major ideas in the body area of the briefing.

Item 11: What does FM 101-5 (SH 1) say you should do in the body of your information briefing?

Item 12: What is the first part of the closing of the information briefing?

Item 13: What is the second part of the closing?

In your conclusion you should bring your audience back to your main idea--your bottom line. The last part of the closing is announcing the next speaker.

Now that we know which type of briefing to use, depending on purpose, and how to format that briefing, we are ready to look at how to prepare effective oral presentations.

ELO 2: Articulate how to prepare and deliver effective oral presentations. (References: SH-1, SH-2, and SH-3)

Have you ever listened to a first-rate presentation, then heard other listeners commenting that the speaker is "a natural"? Don't believe it. That speaker studied his audience. He carefully crafted the material and then rehearsed it aloud--making dozens of changes along the way. That speaker mastered the subject matter and put all his energy into delivering it. He was excited about the topic and communicated that excitement to the audience. In short, that speaker knew what he was going to do and how he was going to do it. The result was that first-rate, "natural," performance.

Thorough preparation is absolutely essential to a successful briefing or speech. If you have not prepared, it will show and your audience will know it immediately. Let's take a look at student handout 2 (SH-2), on effective speaking. SH-2 elaborates on some key items of the briefing outline in FM 101-5 (SH 1) that starts on page SH-1-5. Student handout 2 discusses effective speaking in general and does not exactly follow FM 101-5.

Item 14: What are the four main parts of the briefing outline as stated in FM 101-5 (SH 1)?

An effective briefing depends on thorough preparation and thorough preparation begins with a good analysis of the situation. Let's discuss what you need to know to make a good analysis. Before you can begin to prepare your briefing, you have to find out who the audience is and the purpose of the briefing. This will help you tell the audience what it wants and needs to hear and what format you need to use. You should want to know several things about your audience, such as:

- Are they military or civilian?
- What are their interests?
- How much knowledge do they have on the subject?

Student handout 2 gives you many suggestions on how to prepare and conduct an effective oral presentation. Let's start by looking at subject selection. Remember that your subject must fit the battle analysis format in SH-4. When you choose your subject, try to pick a topic that interests your audience.

Item 15: What is likely to happen if you ignore the interests of your audience in your subject selection?

Item 16: How can you narrow your subject to fit your time limits?

The effectiveness of your presentation depends in part on whether you accurately analyze the situation--your audience, purpose, subject, and the facilities. A thorough initial analysis will help you make sure that you prepare an effective presentation that serves your purpose and is appropriate for your audience.

The second step of the briefing outline in FM 101-5 (SH 1) is "schedule of preparatory effort." The concept here is to schedule your time effectively and ensure you complete all necessary preparation for your briefing. The steps under "schedule of preparatory effort" are:

- Complete analysis of the situation.
- Prepare preliminary outline.
- Determine requirements for training aids, assistants, and recorders.
- Edit or redraft.
- Schedule rehearsals (facilities, critiques).
- Arrange for final review by responsible authority.

The next item in the briefing outline in FM 101-5 (SH 1) is "construct the briefing" which includes:

- Collect material.
- Prepare first draft.
- Revise first draft and edit.
- Plan use of visual aids.
- Practice.

Armed with what you discovered during your initial analysis of the situation, you are now ready to construct the briefing. Later we will look at SH-4 on battle analysis and go into more detail about defining the subject and collecting research material. Once you have collected material, you're ready to start organizing your presentation into a first draft.

On page SH-1-6, the first five steps under "prepare first draft" are more appropriate for a decision briefing. When you prepare a draft outline for your information briefing, keep in mind the three main parts: introduction, body, and closing.

Let's discuss some of the ways you can make each of the three major areas of a briefing more effective. Your student reading 2 is designed to provide you with numerous tools to improve your briefings. In general, an introduction should include a greeting, a strong attention step, the big picture, and a summary of the key points.

Item 17: What should an effective attention step do?

Item 18: Is an attention step always necessary?

When you're sure that your audience already has an interest in your subject--in a briefing, for example--you may simply introduce yourself, the subject, its classification, and the reason for the briefing (if it's not already clear). An attention step doesn't need to be elaborate to be effective. An attention step will be effective if it lets the audience know what's in it for them if they listen.

Item 19: If you choose to use humor, what constraints must you exercise?

Item 20: Why should your bottom line be brief?

Item 21: When planning your introduction, what should you remember about the order in which you list your main points?

The next major area is the body. In the body of your briefing, you should develop your ideas logically. Your presentation must be well organized. Let's discuss some ways to make the development area more effective.

Item 22: How should you sequence your main points to make your presentation effective?

Put your main points in a sequence that best supports your subject and bottom line/big picture (battle analysis step 4, draw lessons learned). There are different ways to sequence your development area (battle analysis step 3, describe the action) depending upon your subject. SH-2 lists some sequencing options on page SH-2-6.

Item 23: How would you organize your main points in sequence by time?

Item 24: What other ways can you sequence your points?

The following is an example of sequencing.

SUBJECT: A CIVIL WAR BATTLE

A. 1ST DAY

1. Positions
 - a. Union
 - b. Confederate
2. Movement
 - a. Union
 - b. Confederate

B. 2ND DAY

1. Positions . . .etc
2. Movements. . .etc

Item 25: What different sequences are used in this example?

This example first describes where each of the armies was on the first day and then their movements. Then it does the same for the second day, etc. This is an appropriate sequence for an oral presentation because it allows the audience to follow along (with an appropriate visual support) since they can't turn back the pages to remember who was where and on which day.

Once you have isolated and sequenced your main points, you need to develop those main points--fill in information that will clarify and support those points. For example, if you make a statement that a particular alternative won't work, it isn't enough just to state that it won't work. To make an effective presentation, you have to prove to your audience why it won't work. How do you do that? How do you effectively develop your main points?

Develop your ideas and main points by using concrete, specific verbal supports, and visual supports such as charts, diagrams, and models. Some examples of verbal supports are comparisons, analogies, and verbal illustrations or descriptions.

Item 26: Where in your briefing is it helpful to put in definitions?

Item 27: What can happen if you use statistics unwisely?

Your information briefing may include information from books you have read. Make sure that you clarify and support--that you back up--your opinions and conclusions about these books using verbal and, where necessary, visual supports.

Now that you have sequenced your main points and added supporting material, you need to add in some transitional words--words that will move you smoothly from one point to another. Transitions are important to ensure your briefing is coherent--holds together clearly and logically.

Here are some examples of effective transitions

“This last point raises a question. . .”

“You must keep these three things in mind in order to understand the importance of the fourth. . . .”

“What was the result of. . .? Just this: . . .”

“Let’s look at another aspect of this. . .”

You also need to know how to conclude an oral presentation effectively.

Item 28: What is the main purpose of your conclusion?

After you prepare your first draft, you need to revise and edit it. You may choose to write out your briefing in a complete manuscript.

Item 29: A manuscripted speech has what drawbacks?

While you are constructing your briefing, you must plan your use of visual aids. Check your visual aids for simplicity and readability. Be sure each visual aid is relevant and necessary.

Item 30: How can you tell if a visual aid has a focus?

The last step in constructing your briefing is practice. Once you have a draft of your information briefing you could write it out, word-for-word on note cards.

Item 31: Is it a good idea to memorize your whole presentation?

We began the lesson by looking at the different types of briefings, their purposes, and their formats. Then we looked at how to prepare an effective oral presentation. Now we're going to look at some of the key communication skills that will make the delivery of your briefing more effective.

You have studied communication throughout your career in NCOES and you know there is more to communication than just the words. During your information briefing your instructor will grade you on some key communication factors. Let's take a look at the standards for key communication factors in student reading 3, starting on page SH-3-8.

Item 32: Besides personality, what are two methods you can use to display enthusiasm:

Item 33: What kind of gestures should you avoid?

Three voice variables are pace, pitch, pause. You can use pauses and changes in pace and pitch to emphasize a point. Variety in pace and pitch helps keep you from being monotone and boring.

To be sure your audience understands your words you must choose precise, simple words and pronounce them correctly. Always strive to enunciate clearly and articulately.

Item 34: What are some examples of poor enunciation that you should avoid?

ELO 3: Identify the elements of a battle analysis. (Reference: SH 4)

This lesson integrates task number 155-397-0010, "Integrate Critical Thinking Skills Derived from Military History Methodologies into the Advanced Training and Education of Subordinate Officers, Warrant Officers, and Non-Commissioned Officers." The proponent for this task is U. S. Army Training and Doctrine Command, Ft Monroe, VA. We will focus on battle analysis and you will use a battle analysis as the subject for your information briefing.

"To be a successful soldier, you must know history," LTG George S. Patton, Jr., wrote to his son just before the launch of the invasion of Normandy in 1944. Many military leaders, both past and present, have stressed the need to study military history, and have passed their conviction on to their subordinates. Some of these same leaders believe that military history provides the most important classroom for future Army leaders.

We define military history as the study of all activities of armed forces in peace and war. There are four commonly identified types of military history: Operational (battles, campaigns, tactics, and planning), Institutional (preparing for war), biographical (military lives, great and not so great), and Social and Technological (context for operations). The study of military history is valuable to Army leaders because it provides a means of thinking about the profession in realistic terms. When you study military history, start with subjects that are personally interesting, study military history continuously, and develop a study program.

GEN Frederick M. Franks, Jr., who Commanded VII Corps during Desert Storm, wrote afterwards: "Training and leader development must include a historical perspective--especially of the conduct of battle." Battle analysis provides a method of understanding conflict and the complexity of military operations. Leaders must be able to integrate a variety of sources of information, determine the relevance of the information, and assess the situation based on the context. Battle analysis methodology provides a tool to accomplish the assessment. Battle analysis methodology, even if not applied in detail, provides a tool for every soldier to understand the profession of arms better.

- Item 35:** What is battle analysis?
- Item 36:** What are the four steps of the battle analysis process?
- Item 37:** What are the types of research sources used to support a battle analysis?
- Item 38:** In addition to content, what must you consider when evaluating research sources?
- Item 39:** What are the factors to consider when outlining the tactical situation?
- Item 40:** What are the main elements of describing the action?
- Item 41:** What are two elements of drawing lessons and insights from a battle analysis?
- Item 42:** What are some frameworks that you can use in drawing lessons and insights from a battle analysis?

Solution/Discussion to Lesson Exercise 1 Briefing

Item 1: When presenting a military briefing, what determines the technique employed?

The purpose of the briefing.

The desired response.

The role of the briefer.

Reference: SH-1-2

Item 2: What are the four types of military briefings?

Information briefing

Decision briefing

Mission briefing

Staff briefing

Reference: SH-1-2.

Item 3: An information briefing deals primarily with what?

Facts

Reference: SH-1-2.

Item 4: What is the intent of a decision briefing?

To obtain an answer or a decision.

Reference: SH-1-2.

Item 5: What is the purpose of the mission briefing?

To provide information.

To give specific instructions.

To amplify the mission.

Reference: SH-1-3.

Item 6: What is the intent of a staff briefing?

To secure a coordinated or unified effort.

Reference: SH-1-3.

Item 7: What are the four parts of the information briefing introduction?

Greeting
Type and classification of briefing
Purpose and scope
Outline or procedure

Reference: SH-1-8.

Item 8: What must a briefer do during the greeting of an information briefing?

Address person(s) being briefed
Introduce yourself and your organization.

Reference: SH-1-8.

Item 9: Where in the introduction should you give the big picture first?

In the purpose and scope

Reference: SH-1-8.

Item 10: What should you include in the outline or procedure part of the introduction?

Briefly summarize the key points and your general approach.

Reference: SH-1-8.

Item 11: What does FM 101-5 (SH 1) say you should do in the body of your information briefing?

Arrange ideas in logical sequence.
Use visual aids correctly.
Plan effective transitions.
Prepare to answer questions.

Reference: SH-1-8.

Item 12: What is the first part of the closing of the information briefing?

Ask the audience for questions.

Reference: SH-1-8.

Item 13: What is the second part of the closing?

Briefly recap your main ideas and make a concluding statement.

Reference: SH-1-8.

Item 14: What are the four main parts of the briefing outline as stated in FM 101-5 (SH 1)?

Analysis of the situation
Schedule of preparatory effort
Constructing the briefing
Follow-up

Reference: SH-1-5 thru SH-1-7.

Item 15: What is likely to happen if you ignore the interests of your audience in your subject selection?

They will lose interest.

Reference: SH-2-3.

Item 16: How can you narrow your subject to fit your time limits?

Pick some aspect of the subject that fits your time limit.

Reference: SH-2-3.

Item 17: What should an effective attention step do?

It should make the audience want to listen.

Reference: SH-2-4.

Item 18: Is an attention step always necessary?

No.

Reference: SH-2-5.

Item 19: If you choose to use humor, what constraints must you exercise?

Resist the temptation of vulgar jokes or language.

Reference: SH-2-5.

Item 20: Why should your bottom line be brief?

The audience has to understand it quickly.

Reference: SH-2-5.

Item 21: When planning your introduction, what should you remember about the order in which you list your main points?

It should be in the same sequence you intend to use in the development portion of your speech. Otherwise you will confuse your listeners.

Reference: SH-2-5.

Item 22: How should you sequence your main points to make your presentation effective?

So that one idea leads naturally into the next

Reference: SH-2-6.

Item 23: How would you organize your main points in sequence by time?

Describe an event by beginning at a certain period or date and move forward or backward in a systematic way.

Reference: SH-2-6.

Item 24: What other ways can you sequence your points?

Cause and effect
Problem and solution
Good news, bad news
General to specific
Spatial

Reference: SH-2-6.

Item 25: What different sequences are used in this example?

The main points are in a time sequence and the supporting points are first in space (positions and movements) and then by army (union then confederate).

Reference: SH-2-6.

Item 26: Where in your briefing is it helpful to put in definitions?

Where you expect the audience to ask, “what do you mean by that?”

Reference: SH-2-7.

Item 27: What can happen if you use statistics unwisely?

You can confuse the audience or embarrass yourself.

Reference: SH-2-7.

Item 28: What is the main purpose of your conclusion?

To draw the thought and feelings of the audience back to your controlling idea--your bottom line.

Reference: SH-2-9.

Item 29: A manuscripted speech has what drawbacks?

It won't sound spontaneous.

Reference: SH-2-10.

Item 30: How can you tell if a visual aid has a focus?

It expresses only one controlling idea.

Reference: SH-2-11.

Item 31: Is it a good idea to memorize your whole presentation?

No. Instead, practice it until you're comfortable.

Reference: SH-2-12.

Item 32: Besides personality, what are two methods you can use to display enthusiasm?

Voice volume and facial expression

Reference: SH-3-9.

Item 33: What kind of gestures should you avoid?

Avoid gestures that are: stilted, meaningless, affected, excessive.

Reference: SH-3-10.

Item 34: What are some examples of poor enunciation that you should avoid?

Avoid slurred words, dropped syllables, and clipped final letters.

Reference: SH-3-12.

Item 35: What is battle analysis?

A process for systematic study of a battle or campaign.

Reference: SH-4-3.

Item 36: What are the four steps of the battle analysis process?

Define the subject, set the stage, describe the action, and draw military lessons and insights.

Reference: SH-4-3.

Item 37: What are the types of research sources used to support a battle analysis?

Books (memoirs, official histories, operational histories, institutional histories), articles, film footage, oral histories, electronic media (worldwide web).

Reference: SH-4-4.

Item 38: In addition to content, what must you consider when evaluating research sources?

Authors' biases and intentions, authors' relationship to the event, time in which the author created the source.

Reference: SH-4-4.

Item 39: What are the factors to consider when outlining the tactical situation?

Study the area of operations and compare the opposing forces.

Reference: SH-4-5.

Item 40: What are the main elements of describing the action?

State the mission of opposing forces, describe initial dispositions, describe opening moves, detail major phases, and state the outcome.

Reference: SH-4-6.

Item 41: What are two elements of drawing lessons and insights from a battle analysis?

Relate cause to effect.
Establish military "lessons learned."

Reference: SH-4-7.

Item 42: What are some frameworks that you can use in drawing lessons and insights from a battle analysis?

Principles of War, Dynamics of Combat Power, Battlefield Operating Systems, or Characteristics of the Offense.

Reference: SH-4-7.

APPENDIX C**Index of Student Handouts**

**This Appendix
Contains**

This Appendix contains the items listed in this table--

Title/Synopsis	Page(s)
SH-1, Extract from FM 101-5, Staff Organization and Operations Appendix E	SH-1-1 thru SH-1-11
SH-2, Effective Speaking	SH-2-1 thru SH-2-12
SH-3, Standards for Information Briefing	SH-3-1 thru SH-3-13
SH-4, Battle Analysis Study Guide	SH-4-1 thru SH-4-7

STUDENT HANDOUT 1

MILITARY BRIEFINGS

**This Student
Handout
Contains**

Appendix E from FM 101-5, 31 May 97. Due to formatting requirements, the page numbers of this SH do not directly correspond to the original page numbers in FM 101-5.

STUDENT HANDOUT 1

Appendix E MILITARY BRIEFINGS

Briefings are a means of presenting information to commanders, staffs, or other designated audiences. The techniques employed are determined by the purpose of the briefing, the desired response, and the role of the briefer. This appendix describes the types of military briefings and gives briefing formats for each type.

TYPES OF BRIEFINGS

There are four types of military briefings:

- Information.
- Decision.
- Mission.
- Staff.

Information

The information briefing is intended to inform the listener and to gain his understanding. The briefing does not include conclusions and recommendations, nor require decisions. The briefing deals primarily with facts. The briefer states that the purpose of the briefing is to provide information and that no decision is required. The briefer provides a brief introduction to define the subject and to orient the listener and then presents the information. Examples of an information briefing are information of high priority requiring immediate attention; information of a complex nature, such as complicated plans, systems, statistics, or charts, requiring detailed explanation; and controversial information requiring elaboration and explanation.

Decision

The decision briefing is intended to obtain an answer or a decision. It is the presentation of a staff officer's recommended solution resulting from analysis or study of a problem or problem area. Decision briefings vary as to formality and detail depending on the level of command and the decision maker's knowledge of the subject (the problem or problem area). In situations where the person receiving the briefing has prior knowledge of the problem and some information relating to it, the briefing normally is limited to a statement of the problem, essential background information, and a recommended solution. However, the briefer must be prepared to present his assumptions, facts, alternative solutions, reason for choosing the recommended solution, and the coordination involved. If the person who is being briefed is unfamiliar with the problem and the facts surrounding it, then a more detailed briefing is necessary. In this case, the briefing should include any assumptions used in analyzing the problem, facts bearing on the problem, a discussion of the alternatives, the conclusions, and the coordination involved. The staff study format in Appendix D provides a logical sequence for presenting a detailed decision briefing.

At the outset of the briefing, the briefer must state that he is seeking a decision. At the conclusion of the briefing, if the briefer does not receive a decision, he asks for it. The briefer should be certain that he understands the decision thoroughly. If he is uncertain, he asks for clarification. In this regard, a precisely worded recommendation that may be used as a decision statement,

once approved by the commander, assists in eliminating possible ambiguities. Following the briefing, if the chief of staff (executive officer) is not present, the briefer informs the SGS or other appropriate officer of the commander's decision.

Mission

The mission briefing is used under operational conditions to provide information, to give specific instructions, or to instill an appreciation of a mission. It is usually presented by a single briefing officer, who may be the commander, an assistant, a staff officer, or a special representative. This depends on the nature of the mission or the level of the headquarters. In an operational situation or when the mission is of a critical nature, it may become necessary to provide individuals or smaller units with more data than plans and orders provide. This may be done by means of the mission briefing. The mission briefing reinforces orders, provides more detailed requirements and instructions for each individual, and explains the significance of each individual role.

Staff

The staff briefing is intended to secure a coordinated or unified effort. This may involve the exchange of information, the announcement of decisions within a command, the issuance of directives, or the presentation of guidance. The staff briefing may include characteristics of the information briefing, the decision briefing, and the mission briefing. Attendance at staff briefings varies with the size of the headquarters, the type of operation being conducted, and the personal desires of the commander. Generally, the commander, deputies or assistants, chief of staff (executive officer), and coordinating and special staff officers attend. Representatives from major subordinate commands may be present. The

chief of staff (executive officer) usually presides over the staff briefing. He calls on staff representatives to present matters that interest those present or that require coordinated staff action. Each staff officer is prepared to brief on his area of responsibility. In garrison, staff briefings are often held on a regularly scheduled basis. In combat, staff briefings are held when required by the situation. The presentation of staff estimates culminating in a commander's decision to adopt a specific course of action is a form of staff briefing. In this type of briefing, staff officers involved follow the general pattern prescribed for the staff estimate being presented.

BRIEFING STEPS

A briefing assignment has four steps:

- 1. Analyze the situation.** This includes analyzing the audience and the occasion by determining—
 - Who is to be briefed and why?
 - How much knowledge of the subject does the audience have?
 - What is expected of the briefer?

Before briefing an individual the first time, the briefer should inquire as to the particular official's desires. The briefer must understand the purpose of the briefing. Is he to present facts or to make a recommendation? The purpose determines the nature of the briefing. The time allocated for a briefing will dictate the style, physical facilities, and the preparatory effort needed. The availability of physical facilities, visual aids, and draftsmen is a consideration. The briefer prepares a detailed presentation plan and coordinates with his assistants, if used. The preparatory effort is carefully scheduled. Each briefer should formulate a "briefing outline" (next page). The briefer initially estimates the deadlines for each task. He schedules facilities for practice and requests critiques.

2. Construct the briefing. The construction of the briefing will vary with its type and purpose. The analysis provides the basis for this determination. The following are the major steps in preparing a briefing:

- Collect material.
- Know the subject thoroughly.
- Isolate the key points.
- Arrange the key points in logical order.
- Provide supporting data to substantiate validity of key points.
- Select visual aids.
- Establish the wording.
- Rehearse before a knowledgeable person who can critique the briefing.

3. Deliver the briefing. A successful briefing depends on how it is presented. A confident, relaxed, forceful delivery, clearly enunciated and obviously based on full knowledge of the subject, helps convince the audience. The briefer maintains a relaxed, but military bearing. He uses natural gestures and movement, but he avoids distracting mannerisms. The briefer's delivery is characterized by conciseness, objectivity, and accuracy. He must be aware of the following:

- The basic purpose is to present the subject as directed and to ensure that it is understood by the audience.
- Brevity precludes a lengthy introduction or summary.
- Logic must be used in arriving at conclusions and recommendations.
- Interruptions and questions may occur at any point. If and when these interruptions occur, the briefer answers each question before proceeding or indicates that the questions will be answered later in the briefing. At the same time, he does not permit questions to distract him from his planned briefing. If the question will be answered later in the briefing, the briefer should make specific reference to the earlier

question when he introduces the material. The briefer must be prepared to support any part of his briefing. The briefer anticipates possible questions and is prepared to answer them.

4. Follow-up. When the briefing is over, the briefer prepares a memorandum for record (MFR). This MFR should record the subject, date, time, and place of briefing and ranks, names, and positions of those present. The briefing's substance is concisely recorded. Recommendations and their approval, disapproval, or approval with modification are recorded as well as any instruction or directed action. This includes who is to take action. When a decision is involved and doubt exists about the decision maker's intent, the briefer submits a draft of the MFR to him for correction before preparing it in final form. The MFR is distributed to staff sections or agencies that must act on the decisions or instructions contained in it or whose operations or plans may be influenced.

BRIEFING OUTLINE

1. Analysis of the Situation

- a. Audience.
 - (1) How many are there?
 - (2) Nature.
 - (a) Who composes the audience? Single or multiservice? Civilians? Foreign nationals?
 - (b) Who are the ranking members?
 - (c) What are their official positions?
 - (d) Where are they assigned?
 - (e) How much professional knowledge of the subject do they have?
 - (f) Are they generalists or specialists?
 - (g) What are their interests?
 - (h) What are their personal preferences?
 - (i) What is the anticipated reaction?
- b. Purpose and type.
 - (1) Information briefing (to inform)?
 - (2) Decision briefing (to obtain decision)?
 - (3) Mission briefing (to review important details)?
 - (4) Staff briefing (to exchange information)?
- c. Subject.
 - (1) What is the specific subject?
 - (2) What is the desired coverage?
 - (3) How much time will be allocated?
- d. Physical facilities.
 - (1) Where will the briefing be presented?
 - (2) What arrangements will be required?
 - (3) What are the visual aid facilities?
 - (4) What are the deficiencies?
 - (5) What actions are needed to overcome deficiencies?

2. Schedule of Preparatory Effort

- a. Complete analysis of the situation.
- b. Prepare preliminary outline.

- c. Determine requirements for training aids, assistants, and recorders.
- d. Edit or redraft.
- e. Schedule rehearsals (facilities, critiques).
- f. Arrange for final review by responsible authority.

3. **Constructing the Briefing**

- a. Collect material.
 - (1) Research.
 - (2) Become familiar with subject.
 - (3) Collect authoritative opinions and facts.
- b. Prepare first draft.
 - (1) State problem (if necessary).
 - (2) Isolate key points (facts).
 - (3) Identify courses of action.
 - (4) Analyze and compare courses of action. State advantages and disadvantages.
 - (5) Determine conclusions and recommendations.
 - (6) Prepare draft outline.
 - (7) Include visual aids.
 - (8) Fill in appropriate material.
 - (9) Review with appropriate authority.
- c. Revise first draft and edit.
 - (1) Make sure that facts are important and necessary.
 - (2) Include all necessary facts.
 - (3) Include answers to anticipated questions.
 - (4) Polish material.
- d. Plan use of visual aids.
 - (1) Check for simplicity—readability.
 - (2) Develop method for use.
- e. Practice.
 - (1) Rehearse (with assistants and visual aids).
 - (2) Polish.
 - (3) Isolate key points.
 - (4) Commit outline to memory.

- (5) Develop transitions.
- (6) Use definitive words.

4. Follow-Up

- a. Ensure understanding.
- b. Record decision.
- c. Inform proper authorities.

Format for an Information Briefing

1. Introduction.

Greeting.

Address the person(s) being briefed. Identify yourself and your organization. “Good morning, General Smith. I’m Captain Jones, the S3 of the 1st Bn 28th Artillery.

Type and Classification of Briefing.

“This is a SECRET information briefing.”

“This is an UNCLASSIFIED decision briefing.”

Purpose and Scope.

Give the big picture first.

Explain the purpose and scope of your briefing.

“The purpose of this briefing is to bring you up to date on our battalion’s General Defense Plan.”

“I will cover the battalion’s action during the first 72 hours of a general alert.”

Outline or Procedure.

Briefly summarize the key points and your general approach.

Explain any special procedures (demonstrations, displays, or tours). “During my briefing, I’ll discuss the six phases of our plan. I’ll refer to maps of our sector, and then my assistant will bring out a sand table to show you the expected flow of battle.”

2. Body.

Arrange the main ideas in a logical sequence.

Use visual aids correctly to emphasize your main ideas.

Plan effective transitions from one main point to the next.

Be prepared to answer questions at any time.

3. Closing.

Ask for questions.

Briefly recap your main ideas and make a concluding statement.

Announce the next speaker.

Format for a Decision Briefing

1. Introduction.

Military greeting.

Statement of the type, classification, and purpose of the briefing.

A brief statement of the problem to be resolved.

The recommendation.

2. Body.

Key facts bearing upon the problem.

Pertinent facts that might influence the decision.

An objective presentation of both positive and negative facts.

Necessary assumptions made to bridge any gaps in factual data.

Courses of Action.

A discussion of the various options that can solve the problem.

Analysis.

The criteria by which you will evaluate how to solve the problem (screening and evaluation).

A discussion of each course of action's relative advantages and disadvantages.

Comparison.

Show how the courses of action rate against the evaluation criteria.

3. Conclusion.

Describe why the selected solution is best.

4. Questions.

5. Restatement of the Recommendation so that it only needs approval/disapproval.

6. Request a decision.

Format for a Mission Briefing

1. **General.** The mission briefing is an information briefing presented under tactical or operational conditions, usually given by a single briefing officer.

2. **The Purposes of a Mission Brief.**

Give specific instructions.

The mission briefing serves to—

- Issue or elaborate on an operation order, warning order, and so forth.
- Instill a general appreciation of a mission.
- Review the key points of a forthcoming military operation.
- Ensure participants know the mission's objective, problems they may confront, and ways to overcome them.

3. **Format.**

While the mission briefing has no set format, a convenient format is the five-paragraph operation order.

1. Situation.
2. Mission.
3. Execution.
4. Service support.
5. Command and signal.

Format for a Staff Briefing

1. **General.** The staff briefing is a form of information briefing given by a staff officer. Often it's one of a series of briefings by staff officers.

2. **Purpose of a staff Briefing.** The staff briefing serves to--

- Keep the commander and staff abreast of the current situation.
- Coordinate efforts through rapid oral presentation of key data.

3. **Possible Attendees:**

- The commander, his deputy, and chief of staff.
- Senior representatives of his primary and special staff; commanders of his subordinate units.

4. **Common Procedures:**

- The person who convenes the staff briefing sets the agenda.
- The chief of staff or executive officer normally presides.
- Each staff representative presents information on his particular area.
- The commander usually concludes the briefing but may take an active part throughout the presentation.

STUDENT HANDOUT 2**EFFECTIVE SPEAKING****This Student
Handout
Contains**

material paraphrased from several publications. It does not provide doctrine. You can use this handout to help you prepare and deliver an effective information briefing or other oral presentation. This handout contains the following topics:

Title/Synopsis	Page(s)
Analyze the Situation	SH-2-2 thru SH-2-4
Collect Material	SH-2-4
Prepare the First Draft	SH-2-4 thru SH-2-7
Plan the Transitions	SH-2-8 thru SH-2-9
Plan the Closing	SH-2-9 thru SH-2-10
Revise the First Draft	SH-2-10
Visual Aids	SH-2-11
Practice	SH-2-11 thru SH-2-12

Effective Speaking

Overview

Factor of leadership: The way you communicate in different situations is important. Your choice of words, tone of voice, and physical actions all combine to affect soldiers. Leadership is more than setting the example and bravely leading a charge. The ability to say the correct thing, at the appropriate moment, in the right way is also an important part of leadership. (FM 22-100)

Leadership competency: You communicate to direct, influence, coordinate, encourage, supervise, train, teach, coach, and counsel. You need to be able to understand and think through a problem and translate that idea in a clear, concise, measured fashion. Your message should be easy to understand, serve the purpose, and be appropriate for your audience. (FM 22-100)

Analyze the Situation

Initial analysis

Success in carrying out a speaking assignment, like any other mission, often depends on how well you understand the situation. For a speaking assignment, you gain that understanding as you do with other missions-- by gathering information relative to the situation.

An initial analysis of your speaking assignment will give you a good understanding of what you need to do and where, when, and how to do it. With this information you can plan and prepare an effective presentation that serves the purpose and is appropriate for your audience.

Audience

Your choice of subject and how you approach it depends largely on who will be hearing your presentation. Before preparing a speech or briefing, find out who will be in the audience. Are they military or civilian or both? What interests them? How much knowledge do they have on the subject? Are they strangers who have no idea of what you're going to talk about?

**Audience,
continued**

Before briefing a senior leader, try to anticipate what he expects. Talk to the officer if appropriate, or ask a secretary or other close subordinate about that officer's major concerns, policies, and fiscal and personnel constraints. Ask also about minor preferences for procedure, style--whether and how to use viewgraphs, slides, or handouts--and formality.

Subject

Audiences will listen more readily if they have an interest in your subject. So, pick a subject that fits your listeners' interests as well as your own. The more interest your audience has in the subject, the less you will have to worry about holding their attention when you speak. If you ignore their interests, in favor of your own, they will lose interest.

Your subject should not be above or below the intellectual capacity of the audience. If your subject is too complex, you will confuse your audience; if it is too simple, you may seem to be talking down to them. Remember, your goal is to communicate. Handle complex or technical subjects so that your audience can clearly understand what you are saying.

Select a subject that you can discuss adequately--in sufficient depth-- within the specified time limits. You owe it to your audience to give them a clear, concise, effective presentation that fits within your time limits.

If your subject is too broad, you won't have time to go into sufficient detail to support your bottom line and your main points. If you try to cram it all in, you'll end up having to rush (you'll talk too fast), or you'll run over your time. If your topic is too narrow, you'll run short or end up including irrelevant material or trivia.

If your topic is too broad, you don't need to drop it entirely. Instead, narrow it--pick some aspect of it that will fit your time limits. For example, you can't effectively present a topic such as "The Causes of the American Revolution" in 10 minutes. You can, however, limit yourself to one aspect of it such as "The Stamp Act" or "The Boston Tea Party." These are relevant subjects that you can explore more fully in a shorter time.

**Subject,
continued**

Even if someone else selects the topic for you, you may still need to adapt it to the time limits. For your information briefing in FSC-TATS, ensure your topic complies with the battle analysis methodology described in SH 4. The steps of a battle analysis are (1) Define the subject, (2) Set the stage, (3) Describe the action, and (4) Draw lessons and insights.

Collect Material

Mindmap

When you finish the initial analysis, mindmap your topic and begin your outline. Sketch out the expression of your controlling idea--that bottom line you'll put up front. Remember to keep your audience and purpose in mind when you are deciding on your bottom line. It, like your subject, must be relevant to the occasion and to the needs and interests of your audience.

Divide your information or evidence into two to five main points. The numbers are more critical in speaking than they are in writing because your listeners won't follow and remember as many points in a single hearing. Even in hour-long presentations, the maximum is about five main points.

Limit your points to those that relate directly to your specific purpose, but make sure you have enough points to cover all the important facets of your specific subject. If they don't, the information you present or the arguments you make may not adequately support your bottom line.

Prepare the First Draft

Introduction

Develop a strong attention step: You must maintain the audience's attention throughout your presentation, but at the beginning your principal task is to capture it. Your attention step should make the audience want to listen.

Two typical audience reactions that you will face are "ho hum" and "why bring that up?" So, before you present your bottom line, build a bridge over these reactions with a good attention step.

Introduction,

When you're sure that your audience already has an interest in your subject,

continued

it's often enough just to state your topic succinctly and then go immediately into your first main point. In a briefing, for example, you may simply introduce yourself, the subject, its classification, and the reason for the briefing (if it's not already clear).

Humor: If you choose humor, resist the temptation of vulgar jokes or language. No matter how well you think you know the listeners, your indiscretion will offend, and that will destroy your credibility. Especially in speech, part of the message is you. Therefore, you should display in all ways the sincerity and high moral purpose you want the audience to believe.

Your bottom line: Continuing the outline of your introductory section, we'll rely on the classic advice you've heard many times before. As far as your introduction goes:

Tell 'em what you're gonna tell 'em.

The statement of your bottom line is critical. It must be brief, and it must be memorable. It must be brief because the audience has to understand it quickly; it must be memorable because the audience usually doesn't have any written material to come back to later.

Announce the main points: Include a summary of the main points--a "plan step"--when the communication is long enough to need one. This will give your listeners an indication of where you are going to take them. It helps them grasp the plan of your discussion and see the relationship of each point to the whole.

The order in which you list the main points in your introduction should be the same sequence you intend to use in the body portion of your presentation. Don't confuse your listeners by setting up a guidepost that points in a different direction from where you are actually going to lead them.

Body

Support Your Bottom Line: Develop your ideas or arguments logically, using supporting information (verbal and visual supports) to convince the audience that your ideas have merit. Depending on your purpose, audience, and time, decide how much information to include, what interpretation of the facts to explain, and how to defend your points.

Tell 'em

Body, continued The ideas you present may be as well organized as the bones in a skeleton, but without supporting material (without substance), they will probably be just as bare and unappealing. Supporting material is the flesh and blood that brings your ideas to life and makes them memorable.

The thought-skeleton of your speech must be there to give it unity and coherence, but the meat--the substance--you put on that skeleton is what gives it body and warmth and reality for your audience.

Sequence your main points (organize the data): When you get up to speak, your main problem will probably be remembering what you planned to say. A good way to overcome this problem is to arrange your main ideas in a systematic sequence so that one idea leads naturally into the next. This will also help your audience follow your presentation and grasp your ideas more easily.

Put your main points in your outline in a sequence that best supports your subject and bottom line. Sequence any minor points to support your main points. Some different ways you might sequence your ideas include:

- Time sequence. Describe an event by beginning at a certain period or date and move forward or backward in a systematic way.
- Cause and effect sequence. Discuss certain events and then point to the results these events produced or will produce.
- Problem and solution sequence. Describe a problem and then present the solution.
- Good news, bad news; bad news, good news.
- General to specific; specific to general: changing focus.
- Spatial; left to right, top to bottom: describing appearances.

You can choose one sequence for your main points and use another for your minor points, but don't shift from one sequence to another when you arrange your main points.

Verbal supports

Verbal supports include examples, illustrations, comparisons, analogies, and the following:

Definitions: Put in definitions when you expect the audience to ask, "What do you mean by that?" You'd rather they didn't interrupt you to ask, so why not anticipate?

Statistics: Statistics are numbers that show relationships among things: to point out increases and decreases or to show how one thing affects another. If you properly gather and analyze them, statistics constitute facts you can use to define or verify your observations. Used wisely, they can save an otherwise vague or unpopular but valid idea. Used unwisely, however, they can confuse the audience or embarrass the speaker.

Specific instances: Specific instances are undeveloped examples. Instead of going into a detailed description of an incident, you simply refer to it in passing. This takes less time than an illustration, but it can have the same effect if the instance is familiar to your audience. If it is not, use a more fully developed illustration. For example, it may be enough for one audience if you simply refer to the Kasserine Pass to make a point about leadership. To make the same point with another audience you may need to give them the whole story.

Repetition: Restatement and repetition implant ideas firmly in the listeners' minds, especially when coupled by parallelism (similar sentence structure or phrasing).

Here's another good example from Winston Churchill:

"We shall defend our island, whatever the cost may be. We shall fight them on the beaches. We shall fight them on the landing grounds. We shall fight in the fields and in the streets, and we shall fight in the hills. We shall never surrender."

Remember though, time is crucial; find a reasonable balance between repetition and efficiency.

Plan the Transitions

**Note them on
your outline**

When you've planned the speech (introduction, body, and closing), review your outline for general coherence. Does it hold together clearly and logically?

At this point you should add to the outline appropriate transitional words and summaries between the main points. For example:

- Now that we've talked about A, let's take a look at B.
- Despite those disadvantages, option three is best because . . .
- Now let me summarize our findings by showing this matrix.

These phrases are probably too obvious for writing, but they're essential in an oral presentation. Why? Your listeners can't see the paragraphs and headings that are clearly apparent in written material. If you don't include transitions and summaries such as these, the audience may misunderstand the new information and lose the intent of the briefing.

**Take your
audience with
you**

Transitions and summaries smooth the introduction of new material. When you move from one point to another, take your audience with you; tell your audience where you've just been and where you're going next. For example:

This completes my discussion of my second point--the facts surrounding HQ-21's accident. In my third point, I'll compare these facts with the requirements for liability that I discussed earlier in the briefing.

In this example, you take your audience by the hand and guide it through the idea thicket. By doing this, you are speaking with the needs of the listening audience in mind. Creative use of transitions and summaries makes your speech more coherent, adds balance, and provides a sense of unity as you speak.

**Some simple,
effective
transitions**

One of the simplest and most effective transitions is to number your main points out loud for your audience. For example: "My first point is . . .," "this leads me to my second point . . .," "third . . .," and so on. Numbering not only makes a good transition, it makes the structure of your presentation clear to your listeners. Your presentation will be easier for them to understand.

Single word transitions, such as "however" and "therefore" work well in the middle of an idea; they let your audience know that you are about to give them some different information. However, don't use the same word too many times; it will lose its effect and become distracting and irritating.

Finally, don't use the word "finally" unless you are really ready to conclude your presentation. Even if you have lots more to say, "finally" signals your listeners that you are almost through; their minds will begin to transition to something else.

Plan the Closing

**Your bottom
line revisited**

Unlike readers, your listeners can't turn back the pages to recall what you said earlier, so use a conclusion whenever you speak.

Tell 'em what you told 'em.

The main purpose of your conclusion is to draw the thought and feelings of the audience back to your controlling idea--your bottom line.

Remember that the end of a speech should convey a sense of completeness and finality. Bring the bottom line into sharp focus and close with decisiveness.

Summary conclusions

In a summary conclusion, you review the main points of the speech and draw whatever conclusions you want to make.

In a speech to inform, a summary ending is nearly always appropriate since it helps to impress upon the listeners the ideas that you especially want remembered.

In a speech to convince, a summary conclusion provides a final opportunity to reiterate the principal arguments you have presented.

Revise First Draft

Wording your presentation

With a well-developed outline in front of you, talk your speech through several times under your breath, composing your sentences in a variety of ways until you find the most effective way to say them. This part of the speaking process is similar to the first draft step in the writing process.

Manuscript?

One way to draft your briefing or speech is to write it out, word-for-word, before you deliver it.

There may be times when you need a complete manuscript. You may need precise, unvarying language for a certain listener because of a security classification or difficult subject matter or to ensure historical accuracy.

There's a definite drawback, however, to delivering a speech you've written out--it won't sound spontaneous. You've probably noticed that many manuscript speeches sound stuffy and stilted. This is because the words we use when we write are often very different from the ones we use in conversation.

Try taping your words instead. Follow your outline, fleshing it out while you record. That way the words will be words you normally use when you talk; they will sound like the real you. Then, if you need to, you can transcribe the tape.

Visual Aids

Plan visual supports

As you draft each visual, keep the following general questions in mind. Your answers should be yes.

- Relevant? Is it necessary and appropriate?
 - Focused? Does it express only one controlling idea?
 - Organized? Does it have balance and visual appeal--all the right parts in the right places, sizes, and colors--without becoming a distraction?
 - Coherent? Does the entire visual flow with such devices as parallelism, connecting words, and transition markers?
-

Practice

Note cards

Unless you are giving one of those rarely-used manuscript presentations, you will need to progress from the written or taped speech to a set of note cards. After appropriate practice, these note cards will be all you need to stay on track.

These note cards should list bullets--key words or phrases (not sentences or paragraphs)--that will trigger the ideas and thoughts you want to get across. Test them to see if you can move smoothly from one thought or idea to the next. If you can't, or you feel something is missing, change your key words or add some more.

Memorizing

In your enthusiasm to perfect your delivery, resist the temptation to memorize. A memorized speech will almost always seem stilted. Worse, your memory may lapse, destroying everything.

**Memorizing,
continued**

So instead of memorizing a whole speech, practice it until you're comfortable with its language. You'll build self-confidence and sound spontaneous. You'll speak with the right words and you won't vocalize the pauses (uh, ah, ummmm).

If you feel you must memorize something, you may find it helpful to memorize the introduction and conclusion. Some speakers simply memorize their main points.

STUDENT HANDOUT 3

Standards for Information Briefings

**This Student
Handout
Contains**

This student handout contains standards for oral presentations. It does not provide doctrine. You can use this handout to help in preparation of your oral presentations.

Title/Synopsis	Page(s)
Overview	SH-3-2 thru SH-3-4
Introduction	SH-3-4 thru SH-3-6
Body	SH-3-5 thru SH-3-7
Closing	SH-3-7 thru SH-3-9
Key Communication Factors	SH-3-9 thru SH-3-12
Information Briefing Checklist	SH-3-13

Standards for Information Briefings

Overview

Motivator Your ability to communicate effectively could have a critical impact on the outcome of a battle. Your communication skills will affect your career and the welfare of your soldiers. This information briefing is an opportunity for you to sharpen your communication skills.

Evaluation This is a graded performance exercise. You must attain a “GO” to graduate. Your instructor will rate your battle analysis briefing as superior, satisfactory, or unsatisfactory using the Information Briefing Checklist, FM 101-5, and this student handout. This evaluation will apply to the Oral Communication portion of your Academic Evaluation Report. If your briefing is “unsatisfactory,” you will present another briefing as a retest within 24 hours.

Resource requirements **Visual aids:** You must use at least two different types of visual aids in your briefing. Visual aids include slides, butcher paper, charts, maps, handouts, models, and flags. If you want to use other visual aids than these, you must clear them with your instructor. **Note:** Printing power point slides as a handout constitutes one type of visual aid.

Equipment: You may use the lectern or any other equipment available in the group room.

Set up: After obtaining your instructor's permission, you may set up the group room as you like for your presentation.

Note cards: You may prepare note cards and use them during your presentation.

**Special
instructions**

Date: Your instructor will announce the date of your briefing.

Speaking Sequence: Your instructor will choose the method of determining the speaking sequence. You need to know who follows you in the sequence so you can announce the next speaker.

Audience: If you aim your briefing at a specific audience, tell your group exactly whom you are briefing before you begin your presentation. This will allow the group to role play that audience.

Outline:

- Turn in your draft outline on day 1 of FSC TATS Phase II. Your instructor will approve your briefing topic and ensure you understand the assignment.
- Make a copy of your final briefing outline for your instructor. Do not merely use the words “introduction,” “body,” and “closing.” Provide enough information in the outline, including your major points, for the instructor to follow your presentation.

Originality: Your briefing must be your own work. You may not deliver an information briefing based on another’s work or done as a group effort. We encourage you to give practice presentations to others and have them give you feedback. After your presentation, you will receive feedback from your instructor and the audience. Your instructor will show you his evaluation of you on the Information Briefing Checklist.

Time

Dry Run: While the student who proceeds you in the speaking sequence is briefing, you may use the break room for a final “dry run.” Note: Your instructor will keep the official time for your briefing, but the group may devise a method for helping speakers keep track of their time.

Setup: You will have approximately one minute to set up the area before you begin your briefing.

Graded requirement: You must present the introduction and body portions of your briefing in 10 (+ or - 2) minutes. Your time for the graded requirement ends when you ask for questions at the start of your conclusion.

Time, continued

Question and answer period: You will respond to questions for up to oneminute. The responses are to clarify information and are not part of the graded requirement.

Concluding statement: Finally, you will give your concluding statement in less than 30 seconds. Your instructor will evaluate your concluding statement, but the time is a limit only and not part of the graded requirement.

Feedback

We encourage you to provide feedback to your fellow students on their briefing. Your comments should be productive and positive in tone. Find something right with the presentation rather than focusing solely on any negative aspects.

INFORMATION BRIEFING CHECKLIST

Introduction

Greeting

Superior: Imaginative attention step immediately gained audience attention; addressed person/group being briefed; identified yourself and your organization. Introduction effectively presented all elements required by FM 101-5.

Satisfactory: Introduction gained audience attention addressed person/group being briefed; identified yourself and your organization. Introduction included all elements required by FM 101-5.

Unsatisfactory: Did not address person/group being briefed. Did not identify yourself and your organization. Introduction failed to include elements required by FM 101-5.

**Type and
classification**

Superior: NA

Satisfactory: Stated type of briefing. Stated classification of briefing. Presented type and classification required by FM 101-5.

Unsatisfactory: Failed to state type and/or classification as required by FM 101-5.

**Purpose and
scope**

Superior: Purpose and scope were brief, clear, memorable, and very effective so that the audience understood the big picture quickly. Purpose and scope met requirements in FM 101-5.

Satisfactory: Purpose and scope were clear and IAW FM 101-5.

Unsatisfactory: Purpose and scope were NOT brief, clear, or IAW FM 101-5.

Outline or procedure

Superior: Outline or procedure included a summary of the main points in sequence. The audience could grasp the plan of the discussion and see the relationship of each point to the whole. Outline or procedure was effective and IAW FM 101-5.

Satisfactory: Outline or procedure included a summary of the main points; listed main points in sequence; and was IAW FM 101-5.

Unsatisfactory: Outline or procedure did not present a summary of main points. It confused listeners by setting up guide posts that pointed in a different direction from where you were actually going; not IAW FM 101-5.

Body

Content

Superior: Subject precisely narrowed to fit time available. Effectively used time to provide an in-depth exploration of topic. Content totally supported the bottom line. Developed all points well. Facts presented were precise, interesting, and accurate. Verbal supports such as examples, comparisons, and quotations were appropriate, interesting, and effective. Visual aids effectively supported major points.

Satisfactory: Subject was neither too broad nor too narrow for time available. Content was relevant and adequately supported bottom line. Facts presented were generally clear, correct, relevant, and interesting. Adequately developed major points. Verbal supports such as examples, comparisons, and quotations were generally effective. Used visual aids as required.

Unsatisfactory: Subject too broad or too narrow for time available. Content weak or failed to support bottom line. Material presented not relevant to topic. Facts largely vague, inaccurate, or uninteresting. Failed to adequately develop major points; presentation lacked verbal supports such as examples, comparisons, and quotations. Lacked visual supports required by FM 101-5. Briefing was unquestionably dull and monotonous.

Sequence

Superior: Well-organized presentation. Selection of major points and sequencing were particularly appropriate and effective in supporting the bottom line. Major points and subordinate ideas logically sequenced so that one flowed naturally into the next. Development effectively presented all elements required by FM 101-5.

Satisfactory: Well-organized presentation; logical development of subject matter and ideas; selection and sequencing of major points supported bottom line. Development included all elements required by FM 101-5.

Unsatisfactory: Presentation failed because of poor organization, lack of unity, or inappropriate methods and techniques; sequencing inconsistent with bottom line and major points; major points did not support the bottom line. Development failed to include elements required by FM 101-5.

Visual Aids

Superior: Room physical conditions acceptable. Visual supports were relevant, effective, professional, and illustrated the points simply and clearly. Briefer was well-acquainted with them and smoothly and effectively introduced, explained, and removed them.

Satisfactory: Room physical conditions acceptable. Visual supports were relevant and generally illustrated the points. Briefer was familiar with them, introduced them at the proper times, and used them with adequate skill.

Unsatisfactory: Little or no regard shown for physical conditions. Visual supports inadequate or lacking, failed to illustrate the point, or contained misspelled words. Briefer/speaker unprepared to effectively use visual supports, used them as a crutch, directed all of his attention to them, insufficiently explained them, or handled them clumsily.

Transitions

Superior: All transitions were smooth and effective, and clarified the relationships between the points.

Satisfactory: Usually made smooth transitions.

Unsatisfactory: Moved from one point to another without clear transitions.

Closing

Ask for questions

Superior: Answered all questions using proper question and answer techniques. Well prepared for questions. Responses revealed a solid knowledge of the subject and allied material. Answers well-organized and facts accurate.

Satisfactory: Usually used proper question and answer techniques. Responses revealed an adequate knowledge of the specific subject. Responded candidly when unsure of an answer.

Unsatisfactory: Failed to ask for questions. Responses revealed a fundamental lack of knowledge; frequent errors of facts; many ambiguities and misleading statements; bluffed to cover up inadequacies; avoided answering direct questions.

Conclusion

Superior: Conclusion returned audience to bottom line and effectively summarized the major points and their relationship to the bottom line. Strong, decisive closing statement clearly appropriate to type of presentation, subject, and audience. Conclusion effectively and smoothly incorporated elements required by FM 101-5.

Satisfactory: Recapped major points and returned to bottom line. Closing statement adequate for type of presentation. Conclusion included elements required by FM 101-5.

Unsatisfactory: No conclusion, or only an ineffective, token conclusion. Conclusion failed to include elements required by FM 101-5.

Announce the next speaker**Superior:** NA**Satisfactory:** Accurately announced the next speaker.**Unsatisfactory:** Failed to announce the next speaker or announced the wrong speaker.**Time****Superior:** Presented the briefing within 1 minute of the target time.**Satisfactory:** Presented briefing/speech within the time limits specified for the oral presentation.**Unsatisfactory:** Failed to present briefing/speech within the time limits specified for the oral presentation. (An UNSATISFACTORY rating for time will automatically result in an overall evaluation of UNSATISFACTORY for the entire presentation.)**Key Communication Factors****Enthusiasm**

(Personality, Voice Volume, Facial Expression)

Superior: Dynamic, enthusiastic presentation; conveyed the speaker's personality, confidence, and evident interest in talking about the subject. Created a feeling of enthusiasm in the audience. Volume strong enough to be heard easily; reflected a feeling of enthusiasm, confidence, and vigor; volume natural, varied and used effectively for emphasis. Facial expressions natural and varied and reflected an attitude of sincerity, and enthusiasm for speaking; effectively emphasized ideas and feelings.**Satisfactory:** Generally enthusiastic presentation; conveyed speaker's personality and interest in the subject. Voice strong enough for all members of the audience to hear; volume varied and created a general feeling of confidence and enthusiasm. Facial expressions natural and varied and reflected interest in the subject.**Enthusiasm, continued****Unsatisfactory:** Presentation generally lacked enthusiasm and personality. Speaker seemed bored, tired, timid, or apologetic. Speaker hard to hear;

voice noticeably weak and lacking in confidence and enthusiasm; volume unvaried and monotonous. Facial expression lacked variety; conveyed impression of boredom or disinterest.

Stance

(Posture, Appearance, Movement)

Superior: Posture erect, alert, comfortable, and natural. Neat and well-groomed (IAW AR 670-1). Movements natural, easy, well-timed and purposeful. Movements supported the message--helped hold attention, maintained interest, and conveyed thoughts clearly.

Satisfactory: Posture straight with weight on balls of feet. Neat and well-groomed (IAW AR 670-1). Not tied to lectern. Movements varied and usually smooth and purposeful but not excessive; generally supported message.

Unsatisfactory: Posture unprofessional, slouching, or hunched. Untidy and careless in attire; unkempt personal appearance and grooming; uniform wrinkled and brass dirty or unpolished. Did not move during presentation (tied to lectern) or movements were awkward, jerky, repetitious, meaningless, or excessive.

Note: It is not necessary to exceed the standards of AR 670-1 to receive a SUPERIOR rating. Uniform and appearance must meet standards of AR 670-1 or other appropriate service regulation.

Gestures

Superior: Gestures varied, and were natural, purposeful, appropriate, and helped keep the audience focused on the message. Use of gestures reinforced ideas and feelings and gave a visual dimension to the words.

Satisfactory: Gestures were natural and appropriate to the occasion; usually purposeful; few distracting mannerisms.

Unsatisfactory: Gestures stilted, meaningless, affected, or excessive; speaker had extremely distracting mannerisms; all gestures looked alike.

Eye contact

Superior: Used eye contact to keep the audience focused on the message. Maintained personal eye contact with the audience creating a feeling that

speaker was interested in each member of the audience individually. Use of notes inconspicuous.

Satisfactory: Usually maintained eye contact with the audience; made eye contact with all members of a small audience or with groups in a larger audience. Referred only occasionally to notes.

Unsatisfactory: Stared at floor, ceiling, or a fixed point in the room; depended completely on notes or script. Failed to make eye contact with audience.

Voice variables (Pace, Pitch, Pause)

Superior: Pace was appropriate for subject and audience; effectively used variety in pace and pitch to emphasize points and convey intensity of convictions and depth of feelings. Used pauses effectively to clarify ideas and emphasize important points.

Satisfactory: Pace varied and appropriate (not too fast or too slow) for subject matter and audience size. Pitch varied within normal range for speaker, not uncharacteristically shrill or monotone. Use of pauses generally effective and usually free of vocalizations.

Unsatisfactory: Uneven, excessively choppy speech; too rapid; created an impression of excessive nervousness or anxiety; words not clear to all members of the audience; pace too slow to keep audience's attention; pace unvaried and monotonous. Voice was uncharacteristically raspy or shrill; pitch monotonous. Use of pauses erratic and made the ideas difficult to follow; speaker rushed words instead of pausing; speaker vocalized pauses.

Clarity

(Word Choice, Grammar, Pronunciation)

Superior: Articulated thoughts and ideas clearly, concisely, and quickly. Words precise, simple, conversational, and used and pronounced correctly. Grammatically correct. Used precise articulation in enunciation.

Satisfactory: Articulated most thoughts and ideas clearly. Used appropriate words. Errors in grammar were minor and not distracting. Seldom mispronounced words.

Unsatisfactory: Did not articulate thoughts or ideas clearly. Often used wrong words or words chosen to impress the audience. Made frequent errors in grammar. Frequently mispronounced words. Used poor enunciation: slurred words, dropped syllables, clipped final letters such as the “g” in “ing.”

**OVERALL
EVALUATION**

Superior: Achieve six or more superiors out of the ten possible superiors for introduction, body, and closing (no superior rating for "Type and Classification" or "Announce the next speaker"). Also achieve four or more superiors out of the six possible marks under key communication factors.

Satisfactory: Achieve less than six superiors for introduction, body and closing or achieve less than four superiors for key communication factors while achieving better than unsatisfactory.

Unsatisfactory: Achieve six or more unsatisfactory marks in the introduction, body, and closing or achieve four or more unsatisfactory out of the six possible marks under key communication factors. Failed to present the briefing within the time limits specified.

INFORMATION BRIEFING CHECKLIST (FSC & BSNCOB)						
NAME (LAST, FIRST, MI)	STUDENT NO.	GROUP ROOM	DATE			
SUBJECT:			LESSON:			
		EVALUATION:	NA	UNS	SAT	SUP
Introduction:						
Greeting:			()	()	()	
Type and Classification:			()	()		
Purpose and Scope:			()	()	()	
Outline or Procedure:			()	()	()	
Body:						
Content:			()	()	()	
Sequence:			()	()	()	
Visual Aids:			()	()	()	
Transitions:			()	()	()	
Closing:						
Ask for Questions:			()	()	()	
Conclusion:			()	()	()	
Announce next speaker:		()	()	()		
Time: _____ (min/sec)			()	()	()	
Key Communication Factors:						
Enthusiasm:			()	()	()	
Stance:			()	()	()	
Gestures:			()	()	()	
Eye Contact:			()	()	()	
Voice Variables:			()	()	()	
Clarity:			()	()	()	
OVERALL EVALUATION:			()	()	()	
Comments:						
(Instructor's signature)			(Student's signature)			

STUDENT HANDOUT 4

Battle Analysis Study Guide

**This Student
Handout
Contains**

material paraphrased from the U. S. Army Training and Doctrine Command's training support package number 155-297-0010, title Integrate Historical Awareness and Critical Thinking Skills Derived from Military History Methodologies into the Training and Education of Self and Subordinate Leaders. You will use the battle analysis format for the content portion of your information briefing in FSC-TATS.

BATTLE ANALYSIS METHODOLOGY STUDY GUIDE

Format for Battle Analysis

1. DEFINE THE SUBJECT:

- a. Determine what, where, when, and who to analyze.
- b. Determine research material available to support study.
- c. Evaluate research material.

2. SET THE STAGE:

- a. Consider the strategic factors.
- b. Consider the operational setting.
- c. Review the tactical situation.
 - 1) Study the area of operations.
 - (a) weather
 - (b) terrain
 - 2) Compare the opposing forces.
 - (a) size and composition
 - (b) technology
 - (c) logistical systems
 - (d) command, control, and communications
 - (e) intelligence
 - (f) doctrine and training
 - (g) condition and morale
 - (h) leadership

3. DESCRIBE THE ACTION:

- a. State the mission of the opposing forces.
- b. Describe the initial disposition of forces.
- c. Describe the opening moves of the battle.
- d. Detail the major phases.
- e. State the outcome.

4. DRAW LESSONS LEARNED:

- a. Relate causes to effects.
- b. Establish military “lessons learned.”

Battle Analysis and Your Information Briefing

You will use this battle analysis format for the content portion of your information briefing in FSC-TATS. In the limited time available for your briefing, you will not be able to cover all steps in the battle analysis in depth. Remember that step 4, Draw Lessons Learned, is the most important step of the battle analysis process. Limit your discussion in step 2, Set the Stage and step 3, Describe the Action, to items that support your lessons learned.

As you establish military lessons learned, ensure you clearly state the framework and the item from the framework relevant to your battle. For example you might state, "The battle of Little Round Top during the Civil War, clearly demonstrated the importance of Leadership as a Dynamic of Combat Power."

Study Guide for Battle Analysis

Overview:

1. General: The U.S. Army Command and General Staff College developed the battle analysis methodology to help its student's structure their studies of battles and campaigns. The format can be easily applied by any military professional seeking insight from historical battles and campaigns to help deepen his/her understanding of warfare and the profession of arms.

- a. The battle analysis methodology is a process for systematic study of a battle or campaign.
- b. This process takes the form of a checklist that ensures completeness in examining the critical aspects of the chosen subject.

2. Format: The checklist is divided into four sections, each of which builds on the previous one(s) to provide a logical order for the study.

- a. The four sections are:
 - 1) **Define the Subject.**
 - 2) **Set the Stage (strategic, operational, and tactical settings).**
 - 3) **Describe the Action.**
 - 4) **Draw Lessons Learned.**
- b. In the first section, you decide what battle you are going to study. In the next two, you gather the information necessary for a thorough and balanced study, and organize it in a logical manner to facilitate analysis. In the last section, you analyze the information to derive "lessons learned."

3. Purpose: The battle analysis methodology is a guide to help ensure that important aspects of the study of a historical battle or campaign, are not forgotten. It is not a rigid checklist that must

be followed to the letter. You do not have to use every part of it in your study, but all of the elements of battle analysis should be considered. Do not let the flow of your study be disrupted by the format's order.

Annotated Battle Analysis Format:

1. DEFINE THE SUBJECT: Just like a military operation, a successful study of military history requires a clear, obtainable objective. The battle analysis format begins with the definition of the study.

a. ***Determine what, where, when, and who:*** Establish the parameters of the study to keep it manageable by determining the date, location, and principal adversaries.

b. ***Determine the research sources:*** Once you have chosen a subject, decide what sources you will need to make a systematic and balanced study. Books and articles will make up the majority of your sources, but other media—such as video, audio, and electronic ones—can also contribute to the study.

1) **Books:** Look for a variety of sources to get a balanced account of the battle. Memoirs, biographies, operational histories, and institutional histories should all be consulted for information on your subject. Do not overlook general histories, which can help provide the strategic setting.

2) **Articles:** Articles from professional military publications and historical journals can be excellent sources of information.

3) **Other:** Documentaries containing film footage of actual events or interviews with people who took part in a battle can add to your understanding of the events. Transcribed oral history interviews with battle participants may also be available. In addition, check the Internet for electronic documents on more recent military operations.

c. ***Evaluate the research sources:*** Finding good sources to support your study is not easy, despite the large volume of published material. As you gather the research material, evaluate each in terms of its content and bias.

1) **Content:** Determine what information the source can give you. Is it relevant to your subject? Will it help you complete your study?

2) **Bias:** Decide to what extent the author is subjective or objective in his/her work. Is there a clear bias? If so, what is it? Does the bias make a difference in your use of the work?

2. SET THE STAGE: This portion of the battle analysis format establishes the setting for the study. First consider the period of history and in which war the battle occurred. Then you must have a good understanding of the strategic, operational, and tactical situations before you can analyze the battle. You may want to consider what were the political, economic, religious, social

and technological factors associated with the war and what influence they had on the battle. The level of detail in this portion of the battle analysis will depend on the purpose of the study and the audience for which it is intended. If the causes of the war and the opponents are well known, there is little reason to go into great detail. Normally, a few paragraphs are enough to give the necessary background to place the battle in context.

a. ***Consider the strategic factors:*** What caused the war? Who were the opponents? What were their war aims? What armed forces did the nations possess? How well trained, equipped, and armed were they? Did any social, political, economic, or religious factors influence the armies?

b. ***Describe the operational setting:*** What campaign was the battle part of? What were the objectives of the campaign? Did any military factors—alliances, tactics, doctrine, or personality traits—affect the campaign? How did the battle fit into the overall campaign?

c. ***Review the tactical situation:*** Since these factors have a direct effect on the operation, this part of the format will often answer why a particular action was or was not taken.

1) **Study the area of operations:**

(a) *Weather*. What was the weather like in the area of operations? How did it affect the operation?

(b) *Terrain*. Use OCOKA (observation, cover and concealment, obstacles, key terrain, and avenues of approach) factors to describe the terrain in the area of operations. What advantages did it give to the attackers or to the defenders?

2) **Compare the opposing forces:** In many ways, this is the heart of the study—analyzing the opposing forces. Describe and analyze the forces involved in the following terms:

(a) *Size and composition*. What were the principal combat and supporting units involved in the operation? What were their numerical strengths in terms of troops and key weapon systems? How were they organized?

(b) *Technology*. What were the battlefield technologies, such as tanks, small arms, close support aircraft, etc., of the opposing forces? Did one side have a technological advantage over the other?

(c) *Logistical systems*. How did logistics affect the battle? Did one side have an advantage in available supplies or transportation?

(d) *Command, control, and communications*. What kind of C3 systems did the opposing forces employ? Were these systems under centralized or decentralized control? How were the staffs organized, and how effective were they?

(e) *Intelligence*. What intelligence assets were available to the opposing forces? How well were they used? What were the major sources of intelligence? Did one side have an advantage over the other in intelligence resources?

(f) *Doctrine and training*. What was the tactical doctrine of the opposing forces, and how did they use it? What was the level of training in the opposing forces? Were some troops experienced veterans, some not, and some in between?

(g) *Condition and morale*. What was the morale of the troops before the fighting, and did it change after the fighting began? How long had the troops been committed, and how did weather and terrain affect them? Did specific leaders affect morale?

(h) *Leadership*. Who were the leaders, and how effective had they been in past actions? How were they trained, and what was their level of experience?

3. DESCRIBE THE ACTION: This part of battle analysis—describing the battle itself—is what most people consider to be real military history. By following the format, you will study the battle chronologically. Do not let this approach disrupt your study of the battle. If you need to skip a phase in order to examine a combat functional area—such as maneuver, logistics, etc.—because it is more important to your overall objective, then do so.

a. *State the mission of the opposing forces:* What were the objectives? What missions were developed to achieve the objectives? Were there other options—such as attacking, defending, or withdrawing—open to the two sides? Were those options feasible?

b. *Describe the initial disposition of forces:* What were the locations of the units of the opposing forces? How were the units deployed tactically?

c. *Describe the opening moves of the battle:* Examine the initial actions by the opposing forces. Did one side gain an advantage over the other in the opening phase of the battle?

d. *Detail the major phases:* Establish a chronology for the battle while examining the actions after the opening moves. Look for key events or decisions that turned the battle toward one side or the other.

e. *State the outcome:* Who won the battle? Did either side achieve its objectives? Did the battle provide an advantage to the winning side, and what was it? Did the battle have any long term effects, and what were they?

4. DRAW LESSONS LEARNED: This is the most important step of the battle analysis process. With this step, you are turning “combat information” in the form of the historical facts of the battle into finished analysis rendered as “lessons learned.”

a. ***Relate causes to effects:*** In trying to distill “lessons” from the study of any battle, it is important to look at why something happened. To do so you will look at the outcome and what caused it. Look for those essential elements of the victory or defeat.

b. ***Establish military “lessons learned”:*** Lessons from the past that are still relevant today are the end product of the battle analysis process. The insights, or “constants of war,” gained from the study should transcend time, place, and doctrine. You can use one of the following frameworks (or another) for focusing analysis of military operations to help find these “constants.” These frameworks are defined in FM 100-5, Operations.

- 1) Principles of War.
- 2) Dynamics of Combat Power
- 3) Battlefield Operating Systems.
- 4) Characteristics of the Offense.

Summary:

In this study guide for battle analysis, we discussed a definition of the battle analysis methodology: A systematic approach to studying past campaigns, battles, or operations, to derive lessons and insights understanding modern military professionalism. We indicated that the methodology, if used carefully, can be applied across the spectrum of military operations. We then discussed the four steps of the battle analysis process: define the subject, set the stage, describe the action, and draw lessons and insights. Step 1 involves finding or being given a subject to study and determining the proper sources to use. Step 2 describes the strategic, operational, and tactical situations prior to the start of the battle. Step 3 looks at how to describe the action by stating the mission, analyzing initial dispositions, assessing opening moves, establishing major phases, and stating the outcome. Step 4 assesses and consolidates lessons and insights and determines their relevance to contemporary military professionalism, using frameworks such as the Principles of War, Dynamics of Combat Power, Battlefield Operating Systems, and Characteristics of the Offense. Use this process as you continue to study military history and you will enhance your critical thinking skills and your effectiveness as a soldier.